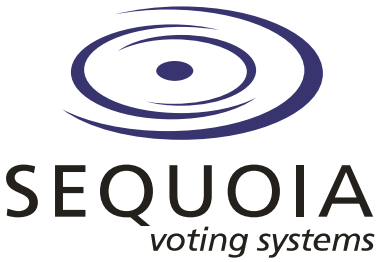

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Ballot Printing System (BPS)/WinEDS Bridge Tool User's Manual

Document Version 1.03

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Contents

About This Guide 5
Purpose 5
Audience 5
Scope 5
Related Documents 5

1 Introduction 7
1.1 System Overview 7
1.1.1 Data Flow 7
1.1.2 Database Setup 8
1.2 Access Required 8
1.3 Run Frequency 8
1.4 Prerequisites to Running Wizard 8
1.4.1 Setting Up Ballot Header Fields in WinEDS (Optional) 9

2 Importing Data from BPS to WinEDS 11

Appendix A Importing Symbolic Languages 17
Prerequisite to Importing Symbolic Languages 17
Importing Symbolic Languages 17

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About This Guide

Purpose

The *BPS Bridge Tool User's Guide* guides the user in importing BPS data into WinEDS.

Audience

Users of the bridge tool should have some understanding of **Microsoft Access**, Microsoft Word, and Microsoft Visio. They should also be familiar with BPS and WinEDS systems.

Users should have a thorough understanding of their election data—especially data originating from a Voter Registration system, such as Integrity or DFM.

Scope

The *BPS Bridge Tool User's Guide* contains instructions for operating the Bridge Tool wizard. It does not contain instructions on how to use the WinEDS, BPS, or Voter Registration software.

Related Documents

WinEDS 3.0 Reference Guide

BPS User's Manual

BPS Help System

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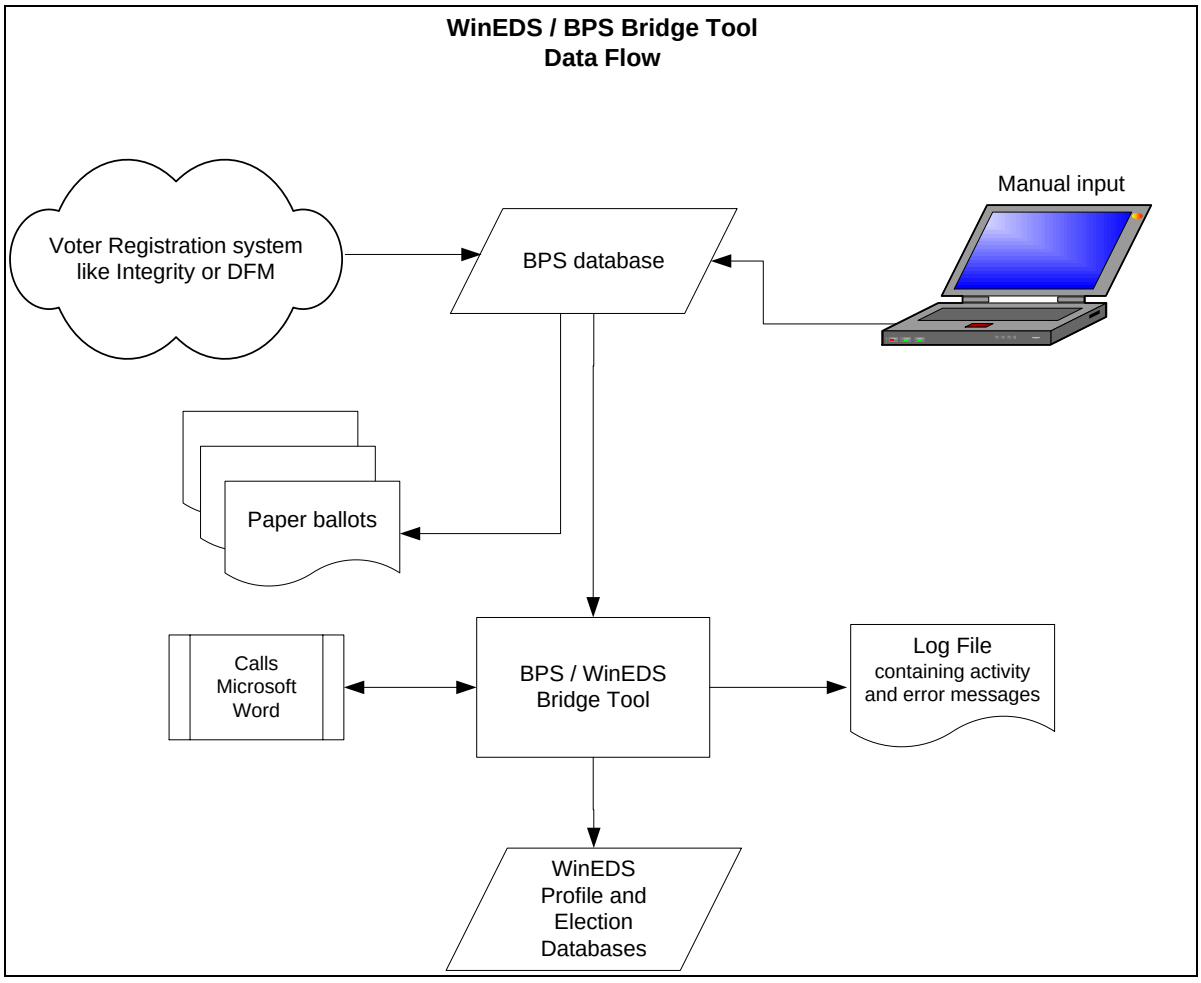
1 Introduction

1.1 System Overview

The BPS / WinEDS Bridge Tool is a Microsoft Access solution, designed to import as much data as possible from the Ballot Printing System (BPS) into WinEDS, thereby making the WinEDS profile and election database setup easier.

1.1.1 Data Flow

An export job from the Voter Registration system feeds data, such as candidates, contests, voter registration numbers, and precincts, to BPS. The wizard moves this data from BPS to WinEDS databases.


WinEDS / BPS Bridge Tool
Data Flow
Voter Registration system like Integrity or DFM
BPS database
Manual input
Paper ballots
Calls Microsoft Word
BPS / WinEDS Bridge Tool
Log File containing activity and error messages
WinEDS Profile and Election Databases

1.1.2 Database Setup

The bridge program will setup most of the WinEDS databases at once. Due to the interrelationships between data elements, you cannot import subsets of the election database. The exceptions are symbolic language and voter registration data.

1.2 Access Required

The BPS Bridge tool application is contained in `BPSWinEDSBridgetool.mde` The bridge links to three BPS files, which are also Microsoft Access database files. It also links to WinEDS Profile and Election databases, which are Microsoft SQL Server databases. You will need both physical and security access to these files and databases.

1.3 Run Frequency

The Bridge Tool can be run unlimited times. Each time the Bridge Tool is run, it erases existing data in WinEDS before importing fresh data from BPS. Therefore, if you plan to run the Bridge Tool again, *do not* make changes directly to WinEDS data—it will be overwritten by imported BPS data. To maintain data consistency between BPS and WinEDS, you should always change BPS and re-run the bridge, rather than forming a habit of changing WinEDS after a transfer. In the long run, establishing a good data transfer from BPS to WinEDS will make future elections easier to setup.

You can run a faster transfer for testing purposes by checking the Skip PSD Assignments checkbox under the Headers tab. Depending on the size of your county, this will significantly reduce processing time, allowing you to quickly view a test dataset.

You can change WinEDS data directly *only* after you have run the Bridge Tool for the last time.

1.4 Prerequisites to Running Wizard

Prior to running the Bridge Tool wizard, ensure you complete the following prerequisites:

- Ensure that your Microsoft Access workgroup information file is the same file used by BPS. This should already be established if you are using BPS on the same computer as the bridge tool. Incorrect workgroup files will result in security errors in the bridge tool.

  Note: For more information, see the Microsoft Access Help regarding workgroup information files.
- Set up ballot header fields in WinEDS (refer to Section 1.4.1).
- Create an Election database.
- Ensure that at least one Edge machine exists in the WinEDS **Profile** screen, under the **Voting Machine** tab.
- Backup the WinEDS Profile and Election database.

1.4.1 Setting Up Ballot Header Fields in WinEDS (Optional)

The Banner, Header, Subheader, Occupation, and Office Message fields in BPS are transferred to WinEDS as Ballot Header fields. To import these fields from BPS, follow the steps below:

1. Open WinEDS, and go to the **System Setup** screen.
2. Select the **Ballot Header** tab.
3. Open each contest header that you want to print the Banner, Header and Sub Header data.

   Microsoft Visio opens.
4. Drag a **Text** object from the stencil to your header.

5. Select the Text tool

6. Click on the text and rename **Text** to the term `Banner`.

   Note: Type the term exactly as it appears, with the first letter capitalized.
7. Repeat steps 4 and 6 to create the terms `Header, Subheader, Occupation` (for candidate header only), and `Office Message` fields.

   The Bridge Tool program searches for these fields in the ballot headers and, if found, inserts the data from BPS.
8. Click **X** to close the Visio window.
9. When prompted, click **Yes** to save changes.
10. Close WinEDS.

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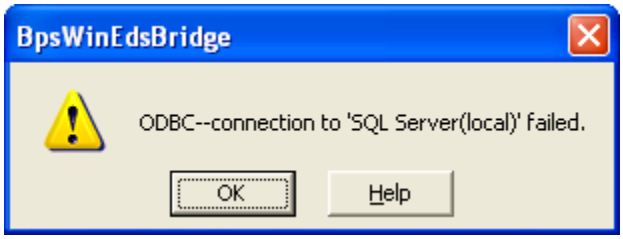
2 Importing Data from BPS to WinEDS

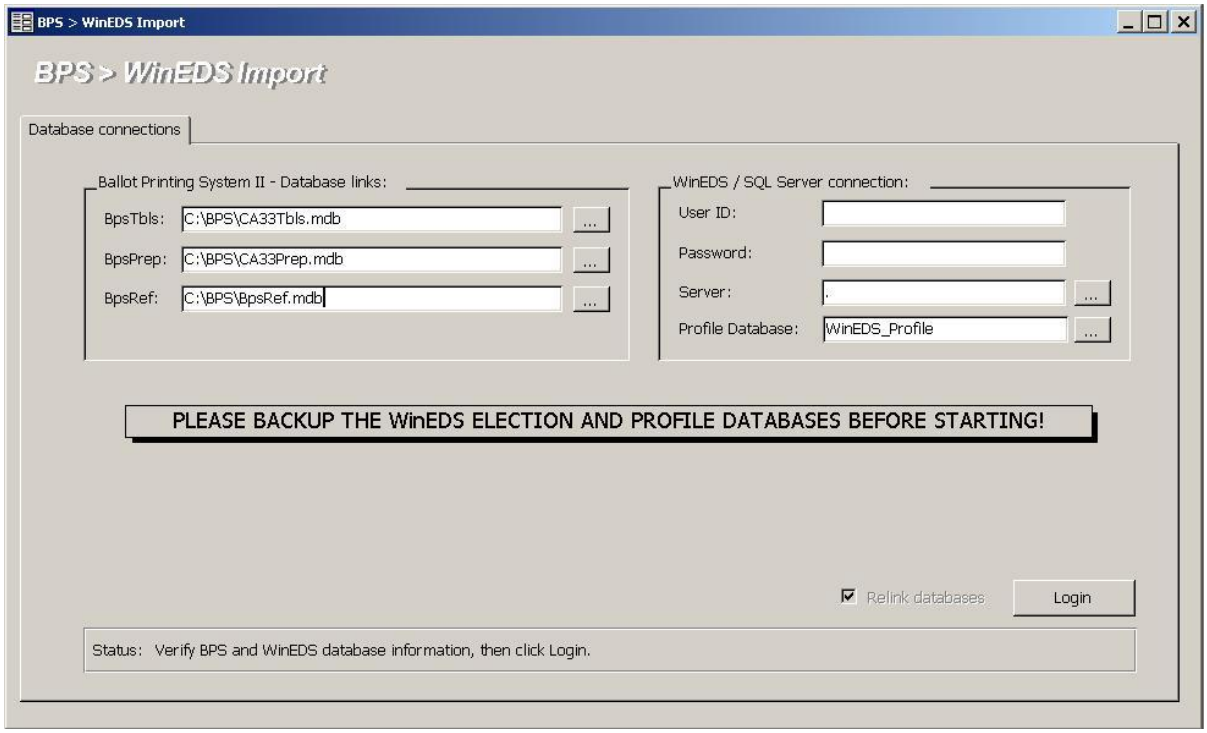
Follow the steps below to import data from BPS to WinEDS.

1. Start Microsoft Access.
2. Open the `BPSWinEDSBridgetool.mdb`
   The **Logon** screen appears.

3. Enter your BPS logon **Name** and **Password**, and click **OK**.
   Note: If you receive a database error as shown below, disregard the error and click **OK**.



The **Database Connections** screen appears.

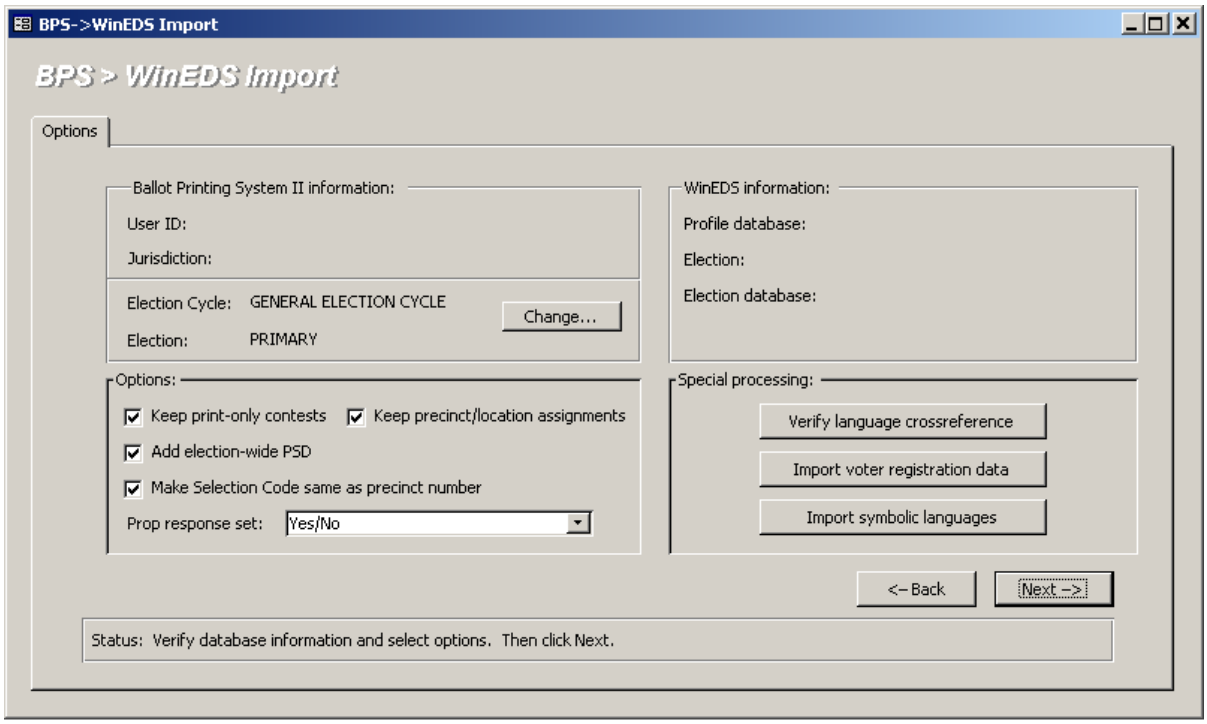


4. On the **Database Connections** tab, do the following:
   a) Under **Ballot Printing System II-Database links**, link to the BPS databases. Click ••• to browse folders.
   b) Under **WinEDS / SQL Server connection**, do the following:
      i. **User ID**: Type your WinEDS user ID.
      Note: User ID must have full privileges to the WinEDS database.
      ii. **Password**: Type the database password.
      iii. **Server**: Select the appropriate server. Click ••• to browse servers.
      iv. **Profile Database**: Type or select the appropriate Profile database. Click ••• to browse databases.

      Note: The Bridge Tool opens the last election used in WinEDS. To open another election, open the election in WinEDS prior to using the Bridge Tool.

5. Click **Login**.

   The **Options** screen appears.



6. On the **Options** tab, do the following:
   a) Under **Ballot Printing System II Information**, verify that the jurisdiction and election cycle is correct.
      i. To change, click **Change**.

         The **Selection Control** screen appears.
      ii. Select the desired jurisdiction and election information.
      iii. Click **X** to close the window.
   b) Under **WinEDS information**, verify the correct election is selected.
   c) Under **Options**, verify that the correct options are checked and that **Proposal Response** set is correct.

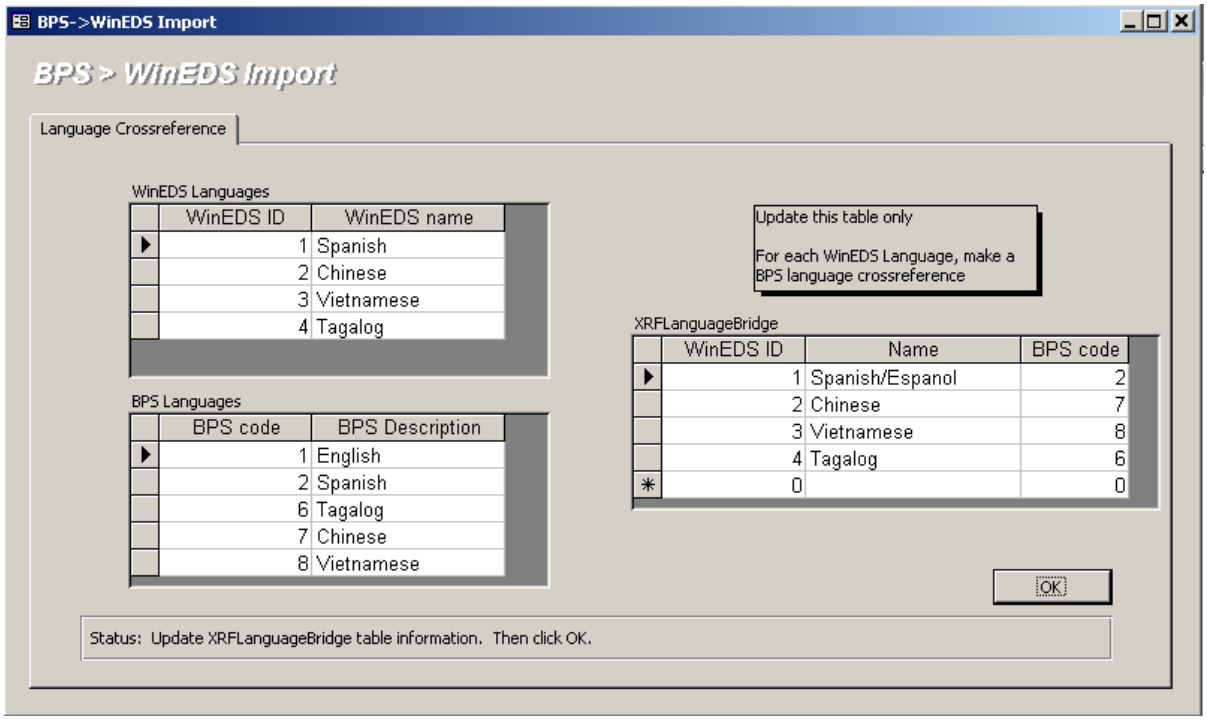
      Note: Otherwise, the bridge will attempt to reassign new precinct information from BPS with their current precinct assignments. New or changed precinct names in BPS will not be assigned a location in WinEDS.

      Note: To remove all precinct location assignments, uncheck the **Keep Locations** checkbox.

d) Under the **Special Processing** section, click the **Verify Language Cross Reference** button.

The **Language Cross Reference** screen appears.

Note: You need only set up this screen once.



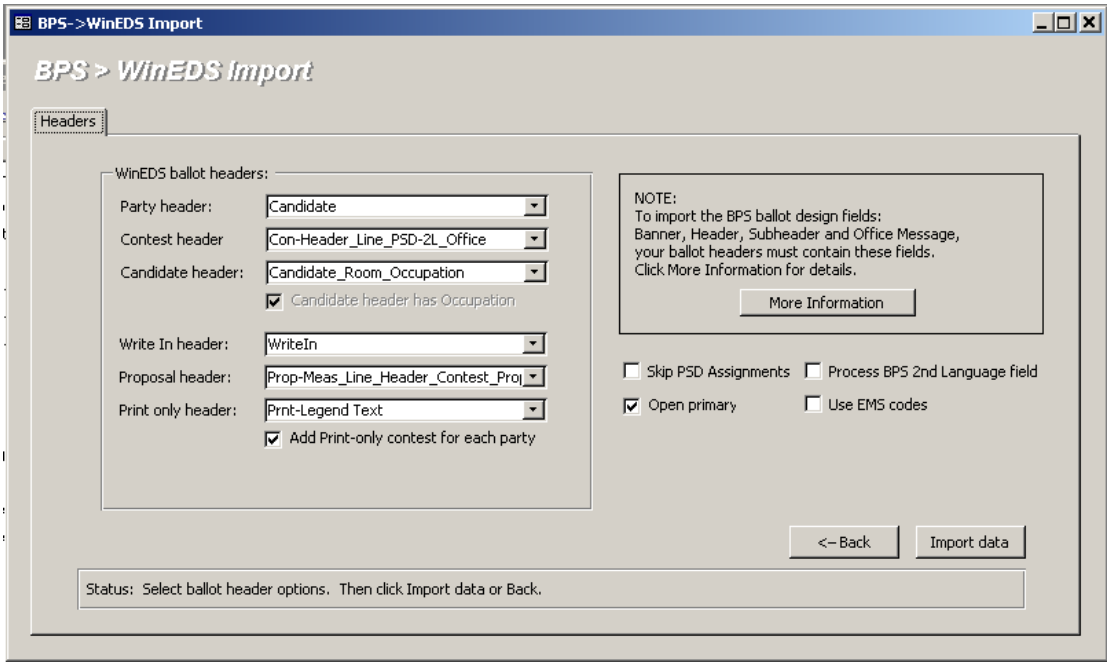
i. Review tables on the left that contain data from WinEDS and BPS.

ii. Create cross references using the right hand table.
In the example above, WinEDS is setup for four additional languages. Therefore, four crossreference records must be created in the table on the right for each language. Matching the WinEDS ID, name, and corresponding BPS Code, records are entered on the new record line (indicated by an asterisk on the grey bar on the left side of the table). The crossreference table enables the bridge to move BPS language data to the proper WinEDS database locations.

e) Click **OK**.

7. Click **Next**.

   The **Header** screen appears.



8. On the **Header** screen, do the following:

   a) Select the appropriate **WinEDS ballot headers**.

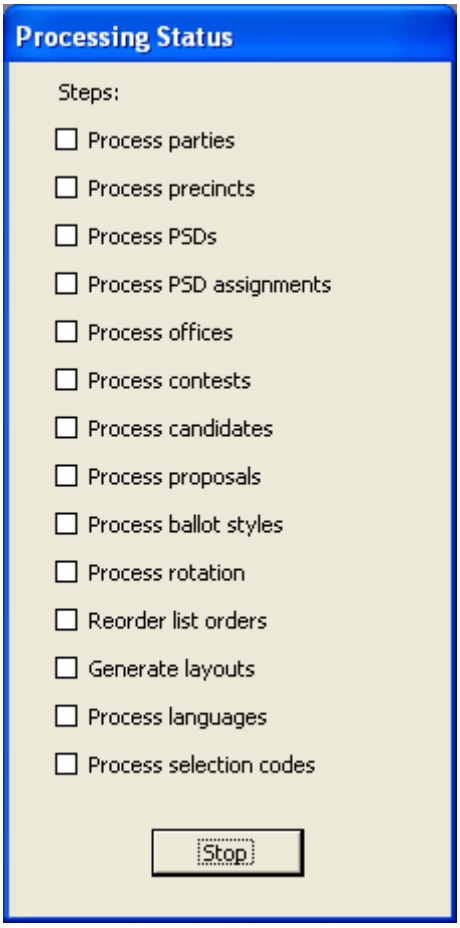
   Note: The checkbox **Add print only contest for each party** appears only if the election is a primary.

   b) Check or uncheck the desired options:

   - **Skip PSD Assignments.** When checked, Political subdivisions will not be assigned to precincts. Depending on the size of your county, this will significantly reduce processing time, allowing you to quickly view a test dataset.
   - **Process BPS 2nd Language field.** This option tells the bridge to process Spanish proposal data from the BPS second language fields. If you have only English and Spanish languages, you should check this option. For multiple and non-Spanish languages, leave this box unchecked. Proposal data will be processed using the BPS language tables instead of the second language fields.
   - **Open Primary**. When checked, the Bridge will perform several processing steps necessary for an open or selective primary. Unchecked indicates a closed primary.
   - **Use EMS codes**. Check this option to have the Bridge put EMS codes into the contest and precinct records. For contests, the EMS code will be placed in the Alternate Code field. For precincts, the Abbreviation field will contain the EMS code.

   c) Click **Import Data**.

   The **Processing Status** screen appears.



As the import occurs, the processing steps are check-marked as completed.
Any errors that occurred during processing are logged into a text file.
After processing is complete, the following message is displayed.

9. Click **OK**.
10. Review the text file for errors as necessary.
11. If you are importing symbolic languages, refer to Appendix A.
12. Click **Exit** to close the Bridge program.

Appendix A
Importing Symbolic Languages

To WinEDS, a symbolic language—also referred to as Unicode or a double-byte character set is a language that does not support the standard ASCII character set. In WinEDS, symbolic languages are implemented by either creating Microsoft Word documents or bitmap objects of the election elements.

Importing symbolic languages using BPS is much the same as performing a mail-merge in Microsoft Word. The data is taken from BPS and put into a Word document, as a table in Word, and then merged—the same as a form letter would be merged. Therefore, it is helpful to know mail-merge functions in Microsoft Word before importing symbolic languages.

The significant difference between a normal mail merge and using the BPS Bridge Tool to import symbolic languages is that WinEDS requires each item to be a separate file. Therefore, when you import symbolic languages using BPS, you will be creating many individual files what will be uploaded into the WinEDS database.

Note: During Edge cartridge creation, images that are stored as Word documents are automatically converted to bitmaps. For significantly faster cartridge creation, it is recommended that you convert all Word objects to bitmaps. Because this action cannot be undone, you should convert Word objects only after all final proofing is complete.

Prerequisite to Importing Symbolic Languages

WinEDS must be setup for the symbolic languages you are importing. These languages should appear on the Language tab of the System Setup window prior to starting. The Language Crossreference table must also be correct in the Bridge. See Section 6d for more information.

Prior to importing symbolic languages, ensure that you have already imported data from BPS into WinEDS. Refer to Section 2, Importing Data from BPS to WinEDS.

The symbolic language import depends on data stored by the bridge during the normal import. This data provides a cross-reference between BPS and WinEDS databases. Without this cross-reference, data cannot be matched, or will be improperly matched.

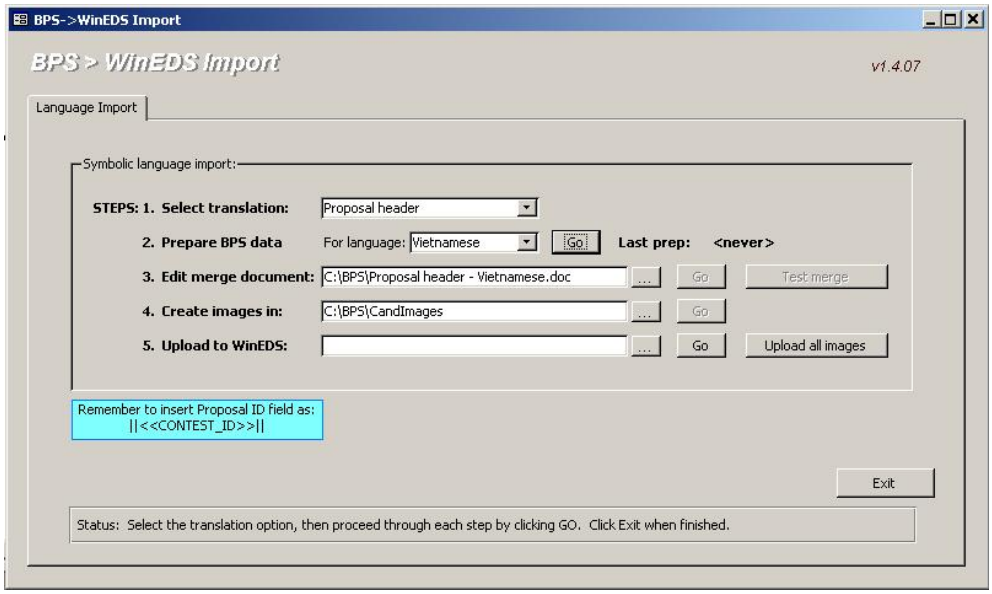
Importing Symbolic Languages

The following procedures are designed to import all symbolic elements at once. However, you may work on individual items as well. For example, in a typical import, all candidates are processed at once. If you notice that one candidate needs a minor adjustment, you can edit the Word document, make your changes, and upload only that candidate image.

1. Login to the BPS/WinEDS Bridge Tool.
   The **Options** tab is selected automatically.

2. Click **Import Symbolic Languages**.

   The **Language Import** tab is displayed.



3. Complete steps 1 through 5 on the screen.

STEP 1 Select translation

From the drop down menu, select the object you want to create. The selections are

- contest header
- candidate header
- contest short name (for the Edge review screen)
- candidate short name
- proposal header
- proposal text

STEP 2: Prepare BPS data

a) From the drop-down menu, select the symbolic language to process.

b) Click **Go**.

Your screen flashes as data is extracted and stored in a Word document.

Important: Be sure you have the correct options selected in steps 1 and 2 when performing steps 3, 4 and 5. Images are processed based on these options, not file names.

STEP 3: Edit merge document

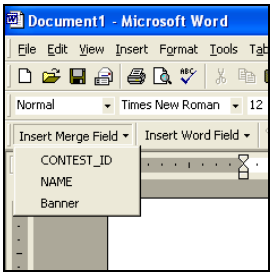
Edit merge document to create your ballot object.

a) Enter a new document name, or click **…** to browse for an existing document.

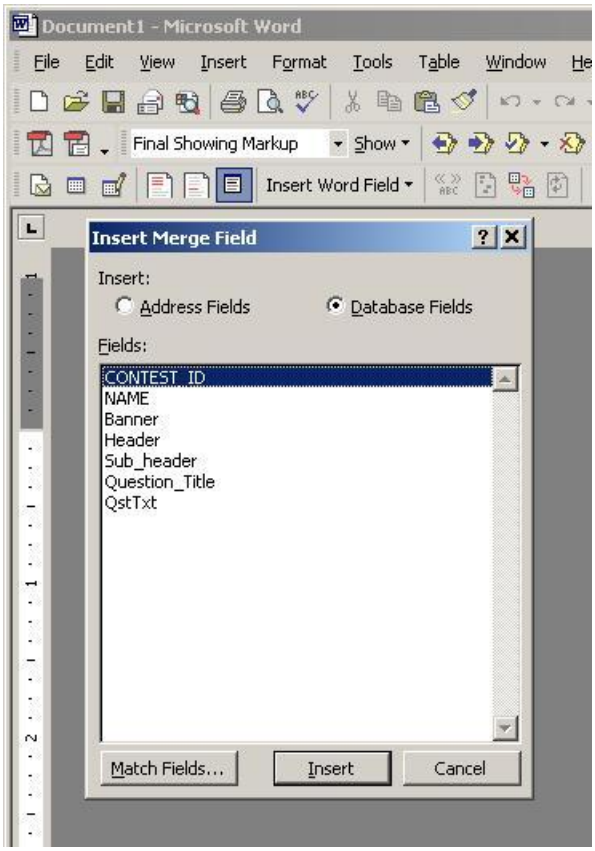
b) Click **Go**.

Microsoft Word opens. The document is opened and prepared as a merge document.

Depending on your version of Microsoft Word, the merge field area on your screen will appear similar to one of the following:



Word 2000 Version



Word 2002 Version

c) Insert fields as they should appear on your ballot.

Note: It is not necessary to insert a CheckMark (the circular voting target) in your objects. It will appear automatically in the same position as in the English object.

d) To match the document with the proper item in WinEDS, insert the record ID field somewhere in the document. The ID is an internal database field (it is not the same as List Order.) It can be anywhere and any size, and it must begin and end with two vertical bars.

For example, for a candidate object, type `||`, then insert the **CANDIDATE_ID** field, followed by `||`. The result should look like `||<<CANDIDATE_ID>>||`.

During upload processing, the program searches for the vertical bars, takes the ID number between the bars, removes this data, then saves the file, using the ID number as part of the file name. The ID is used when uploading to WinEDS. For proposals, use the CONTEST_ID merge field.

e) Format your document as needed to correct the page size, margins, fonts, or other document attributes.

f) Save your document and exit Word.

g) To see how the merge will appear for all objects, click **Test merge**.

This will perform a merge and open a new document.

A screen similar to the following appears:

Form Letters1 - Microsoft Word
克爾·安東尼·佩魯特卡 • MICHAEL ANTHONY PEROUTKA 美國獨立黨
納德•派爾提爾 • LEONARD PELTIER 和平與自由黨
翰 F. 凱瑞 • JOHN F. KERRY 民主黨
維•考布 • DAVID COBB 綠黨
治 W. 布希 • GEORGE W. BUSH 共和黨
克爾•拜德納瑞克 • MICHAEL BADNARIK 自由黨
爾•瓊斯 • BILL JONES 共和黨 農場主/企業家
J. 格蘭德曼 • DON J. GRUNDMANN 美國獨立黨
脊椎按摩療法醫生
姆斯 P. "吉姆" 格雷 • JAMES P. "JIM" GRAY 自由黨
法官
莎•菲蘭德 • MARSHA FEINLAND 和平與自由黨 公立學校教師
芭拉•鮑克瑟 • BARBARA BOXER 民主黨 美國參議員
蘭德'(傑瑞) M. 馬克尼尼 • GERALD (JERRY) M. MCNERNEY 民主黨
查德•波姆伯 • RICHARD POMBO 共和黨 美國眾議員/牧場主
賴恩•瞿爾茲 • BRIAN HOLTZ 自由黨 工程師/作家/父親
傑士 • CHRIS HAUGEN 共和黨 教師
娜 G. 埃斯瞿 • ANNA G. ESHOO 民主黨 美國眾議員
田 • MIKE HONDA 民主黨 美國眾議員
蒙德 L. 契庫 • RAYMOND L. CHUKWU 共和黨 企業家/航空工程師
格拉斯•亞當斯•邁克尼亞 • DOUGLAS ADAMS MCNEA 共和黨
科學家
伊•羅弗格林 • ZOE LOFGREN 民主黨 美國女眾議員
庫斯•韋爾奇 • MARKUS WELCH 自由黨 資訊技術主管
•史密提安 • JOE SIMITIAN 民主黨 加州眾議員
蘭 M. 賴斯 • ALLEN M. RICE 自由黨 工程師/技術文件撰寫人
恩•佐爾瞿夫 • JON ZELLHOEFER 共和黨 父親/教育工作者/工程師
克爾•勞森 • MICHAEL LAURSEN 自由黨 軟體工程師
安•帕特里克•考諾利 • SHANE PATRICK CONNOLLY 共和黨
財務經理

h) Check the results of the merge.

To make alterations that will affect all merge records close the document and repeat **STEP 3 Edit Merge Document**.

To change to only a few of the objects, note the items needing changes. You can open the individual documents after completing Step 4.

Note: the test merge document cannot be used for processing. Do not make changes to this document, since there is no way to use the data.

STEP 4 Create images in:

Create individual images.

a) Select a folder to place the merge documents.

b) Click **Go**.

This step performs a merge and creates a document for each object.

For example, if you have 30 candidates in your entire election, 30 Word documents will be created, one for each candidate header. Each document will be formatted the same as the test merge, except that each file will contain only one object.

The file name consists of the object type, language and record ID.

Warning: All existing files of this type will be deleted before processing begins.

If you noted individual items that needed changes from Step 3, you can edit the individual Word documents before uploading them to WinEDS. You must know the record ID of the objects to change. Start Microsoft Word and open the documents you wish to edit.

STEP 5: Upload to WinEDS

Upload images to WinEDS. You have the option of uploading a single file, or all files in the folder specified in step 4.

Note: The destination in WinEDS is based on the options selected in steps 1 and 2, not on the file name.

Upload a single file

a) Select the file.

b) Click **Go**.

Upload all files

a) Specify the folder in step 4.

b) Leave STEP 5 blank.

c) Click **Upload all images**.

All uploads overwrite existing data in WinEDS.

After images are uploaded, the message **Done** is displayed.

4. Backup your databases!
5. When you are finished, click **Exit**.

Converting all your images from Word documents to bitmaps in WinEDS will significantly improve the time it takes to create an Edge cartridge. This task is usually done after final

ballot proofing. Refer to the *WinEDS Reference Guide*, Chapter 10 Tools for more information.